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Mignolli, G.; Nijkamp, P.

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## SERIE RESEARCH MEMORANDA

Values and effects of local identity preservation:  
A taxonomic approach

Cuido Mignolli  
Peter Nijkamp

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VALUES AND EFFECTS OF LOCAL ZDENTZTY PRESERVATZON  
A **TAXONOMIC** APPROACH

*Guido Mignolli*  
*Università degli Studi di Ferrara*  
**CARID**  
*Centro di Ateneo per la Ricerca e l'Innovazione Didattica*  
*via Savonarola, 25*  
*44100 Ferrara*  
*Italy*

*Peter Nijkamp*  
*Dept. of Spatial Economics*  
*Free University*  
*De Boelelaan 1 105*  
*1081 HV AMSTERDAM*  
*The Netherlands*

PN981GM

**Abstract**

This paper is positioned at the crossroads of three scientific disciplines: economics, planning and cultural heritage preservation. It aims to present a **general** framework for local identity analysis and **historic** environment preservation within the context of a more comprehensive urban ecological planning paradigm. Based on the notion of sustainable development, a **taxonomic** approach is designed with a view to the creation of an evaluation framework that addresses **historic** entity, public and private values, public and private **action** strategies, and impacts on various relevant **social** groups. Due attention is given to three sources of value: the intrinsic values of cultural goods, the potential of cultural goods for local or regional development, and the **needs** and the willingness of the local community concerned.

## 1. Basic considerations

This paper will address the issue of *local identity*. This has been a much-debated concept in recent years, and many efforts have been made to agree upon a common definition. For the purpose of this study, it is useful to refer to the following definitions:

- The first comes from the *historic* field; it considers 'local identity' as an evolutionary concept, changing from formal and aesthetic towards social and cultural considerations of heritage. Local identity is then strictly connected to the *historic environment*, which represents a long-term evolutionary significance and allows its recovery and valorization. Meanwhile, a great concern is emerging for the values of human communities and the need to preserve cultural diversity.
- The second is derived from the modern *urban and regional* planning field and considers local identity conservation as its main goal. And, in doing so, it directs an effective means of sustainable city and territory development. To highlight the importance of protecting and valorizing the identity of places and communities obliges decision-makers – limited by the perennial problem of financial resources and the complexity of certain decisions – to establish priorities and methods for cultural goods recovery within the context of global actions for territory development and human evolution<sup>2</sup>.

Values, effects, impacts and benefits – which will be treated below – refer to our prior concerns. They do not only refer to the 'tout court' preservation of cultural and environmental goods, but above all concern the potential of the historic environment, in directing sustainable cultural, social, environmental and economic development processes (see also Figure 1). This paper deals with *integrated urban planning* – or *ecological planning* – as a suggestion for new ways of reaching a balance between conservation and transformation; that is, to support territorial evolution and technical and economic growth, by considering the actual needs of the environment and humanity.

## 2. Local identity and historic environment: conceptual framework

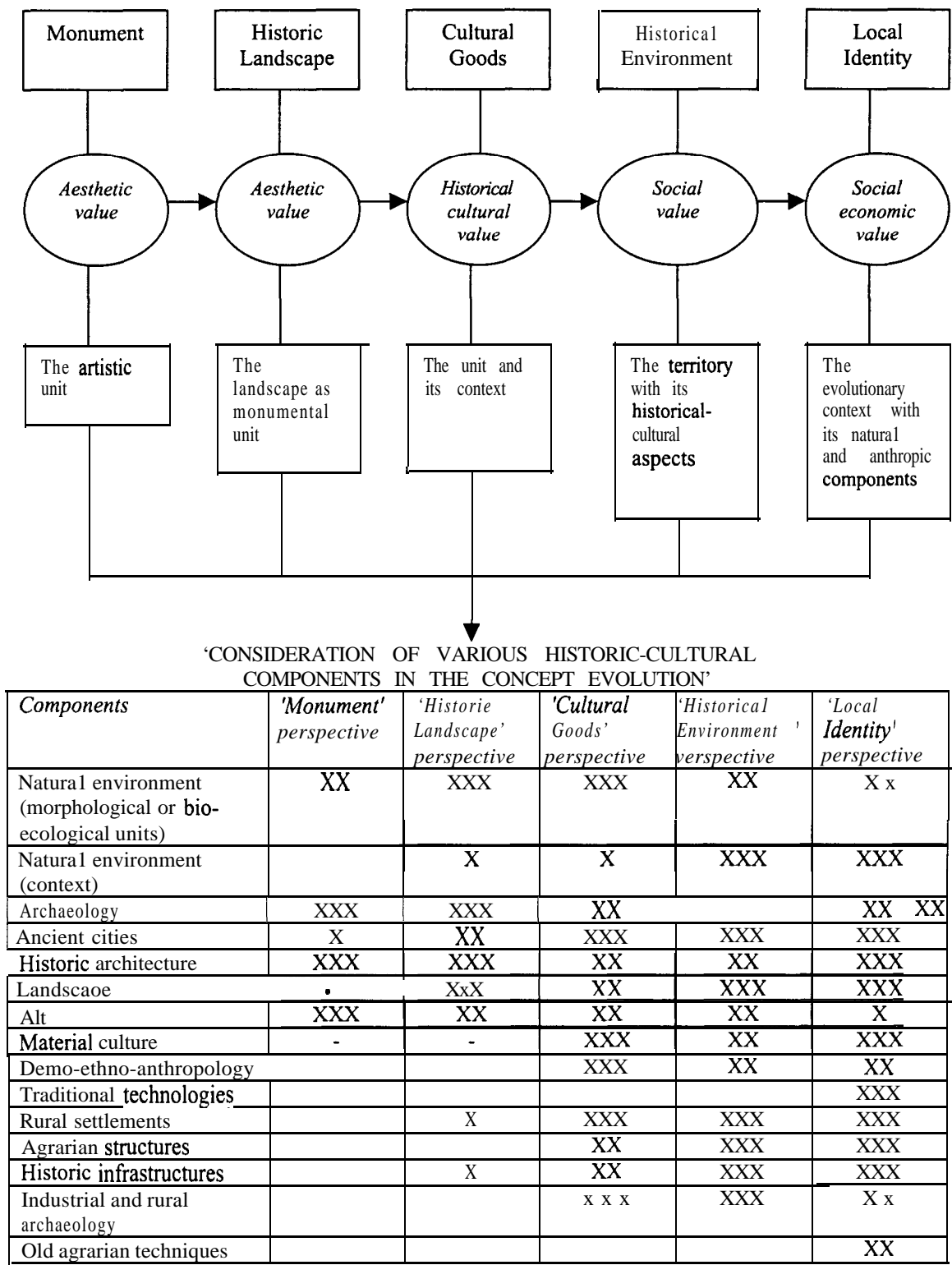
### 2.1. From local identity knowledge to sustainable development

A development process has to strongly draw from local resources and be attentive to environment preservation and traditional technologic rehabilitation in many sectors. This applies to advanced regions, but especially to peripheral areas of the western world. The prospects of actions towards sustainable development and integrated conservation appear to be the only ways to lead local communities to a balanced evolution, by overcoming imported technological systems (which usually paid no attention to the local resources).

"A new concept of sustainability, in the development process, has to be based on *globalism*"<sup>3</sup>. A significant phase in the ecological approach to regional planning is the definition of the element set: which constitutes an overall cultural system. The cultural system

refers to the natural (physical environment, biological environment, e.g.) and to the **human ecosystem** (historical built heritage, old settlements, demo-ethno-anthropological goods, e.g.);

Fig. 1. The evolution of the 'cultural goods' concept during the present century



For each perspective: from great (XXX) to low/no importance (-), with regard to popular interest and scientific research in the field.

their **preservation/activation** takes an important role in the process of regional and urban **planning**<sup>4</sup>.

The pre-eminent **factors** in the recent process of physical planning for less developed regional **areas** include the following:

- the natural resources inside or near urban **areas**;
- the historically-built heritage and the unrepeatable environments in the old cities;
- the technological traditions in local communities, regarding energy saving and soil conservation, and greater equilibrium in the built environment.

The **first** element concerns open **spaces** in urban and metropolitan **areas**: green zones, urban empty zones and cultivated **spaces**. The **second** factor refers to the recovery of **historic** settlement environments; they are the **material** testimony of past **eras**, and they have the characteristics of irreproducibility. The third factor considers old **technologies** in new ways to best use local resources, and **cope** with **economic**, social and environmental problems.

These are the central **aspects**, but the definition problem of local identity is becoming more complex as it becomes critical to current development **processes** and efforts to make a transition from a conservationist to integrated planning **logic** (to conjoin physical and **historic-cultural** resource preservation with the **needs** for **human** community development).

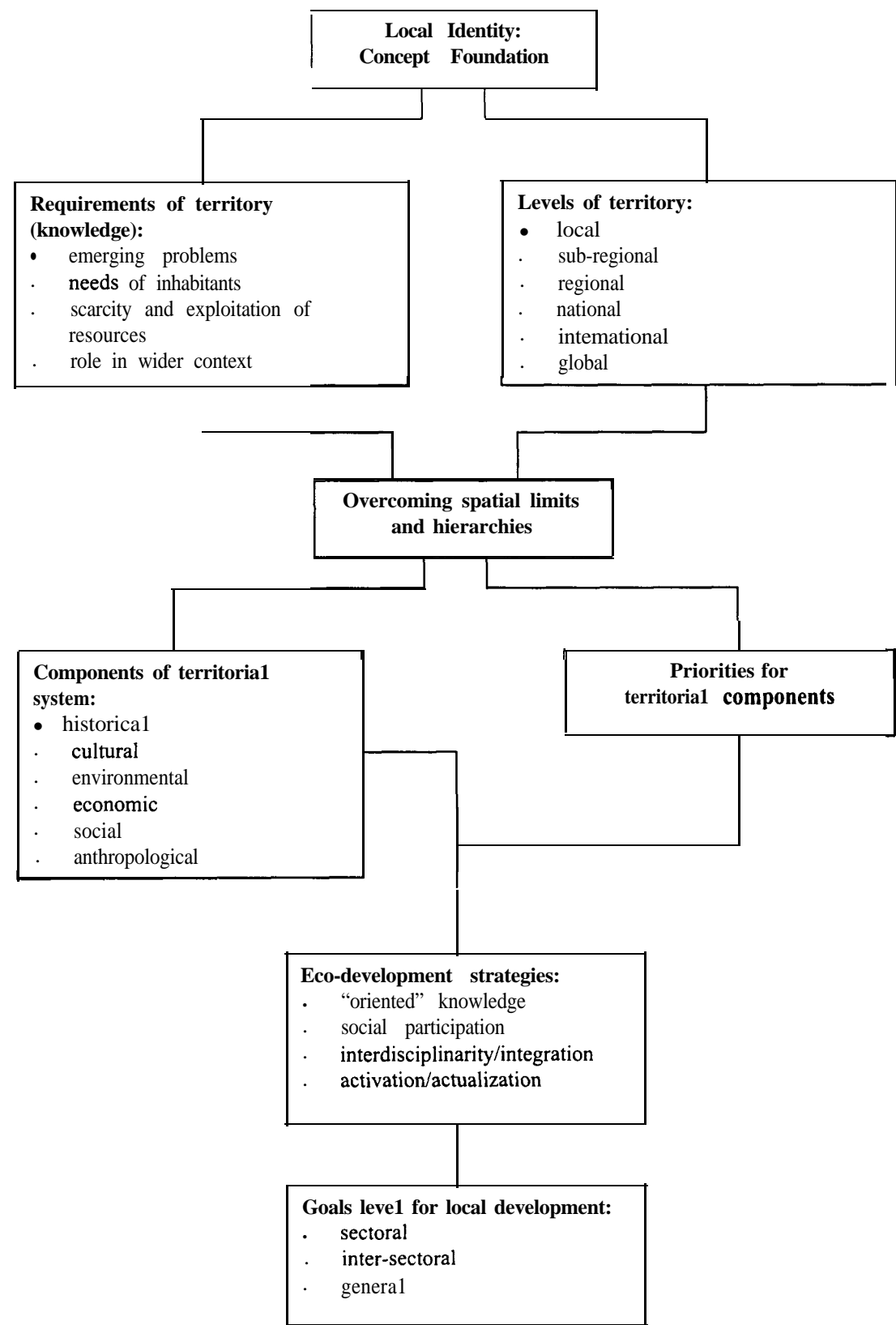
Figure 2 **proposes** a model with various phases, from the definition and analysis of local identity, to the **processes** of valorization for sustainable territorial **development**<sup>5</sup>. We need to **define** the basic concept of local identity and distinguish the current **necessary** conditions in the **selected areas**, and **decide** on which spatial level to **operate** in order to **achieve** our goals. Next, we need to discern within the local identity **debate** between 'strong' **areas** to **protect**, and weak **parts** to leave to the **mercy** of uncontrolled exploitation. The goal is to direct regional **areas** to continuous and balanced **processes** of conservation and transformation.

Subsequently it becomes necessary to **identify** the territorial system **components** and assign a role and "weight" (relative priority) for **each** one related to local identity valorization. The **final** phases of our modeling process concern strategies and **objectives** for **eco-development**; social participation and proper involvement by **historic** heritage as determinants for integrated planning.

Ecological approaches to territory and **human** settlement transformation are steadily increasing. **Projects** and case studies reveal attempts to integrate the sustainable use of environmental resources, to **recover historic-social** and cultural values, and to **address needs** for **economic** improvement. The proposed strategies differ at **each** territorial level: national, regional, and local, and **incorporate** a variety of **human** concerns according to the expected **benefits** from the implementation of ecological planning actions.

This study **classifies** current policy orientations and strategies **fundamental** to the approach of territorial phenomena analysis and economic/ecological planning. We **also** point out primary **objectives** and **benefits** (for the complete framework, see Figure 3). These **aspects** are defined according to the following spheres: cultural, social and anthropological, economic, environmental.

*Fig. 2. Local Identity: from identification to activation for territorial development*





*Fig. 3. Orientations, objectives, benefits, in the process of local identity recovery and ecological planning*

Cultural Sphere		
Orientations/Strategies	Pre-eminent Objectives	Benefits
Formulate strategies of <b>long-term</b> research on territories and cities according to public institutions (from national to the local level).  Return to traditional use of natural resources.  Protect habitat and species; they are particularly sensitivity to <b>human</b> impact.  Protect marginalized cultures.  Formulate <b>specific</b> strategies for <b>each</b> territorial and urban area in relation to local communities.  Consider the concept of 'constant renewal' as the key for planning <b>processes</b> .	Recovery of 'environmental <b>wisdom</b> ' of local communities, in terms of resource use modalities, aesthetic sensibilities, <b>building</b> modalities, traditional <b>technologies</b> .  Protect and valorize landscapes, complexes, and units of <b>historic-cultural</b> interest.  Increase knowledge of territory, and the <b>dynamics</b> of evolution.  Protect environmental <b>diversity</b> .	Enjoyment of intrinsic <b>values</b> of unrepeatable environments.  <b>Scientific</b> development.  Increasing human's cultural awareness level.

Social and Anthropological Sphere		
Orientations/Strategies	Pre-eminent Objectives	Benefits
<b>Social</b> participation in directing national <b>policies</b> .  Protect <b>social</b> communities or minorities; they are particularly sensitive to <b>human</b> impact.  Formulate strategies to capillary diffuse environmental education.  Limit the service sectors of cities.	Valorize the <b>diversity</b> in <b>human</b> communities.  Reinforce the 'capacity to do' autonomously of local communities.  <b>Social</b> participation in urban and regional planning.	Increase quality of life.  Positive evolution in <b>human</b> relationships.  Reduction of crime.

To be continued

Economical Sphere		
<i>Orientations/Strategies</i>	<i>Pre-eminent Objectives</i>	<i>Benefits</i>
<p>Improve industrial production, in accordance with attitudes, life styles, and potential of local population and resources.</p> <p>Incentive (monetary, <b>fiscal</b>, etc.) to <b>reduce</b> pollution emission, avoid further environmental damages, and improve environmental quality.</p> <p>Motivate population to <b>restore</b> private <b>historic</b> buildings.</p>	<p>Direct <b>economic benefits</b> to local communities.</p> <p><b>Encourage</b> local communities towards technical autonomy.</p>	<p>Recreational and educational use of natural and anthropological eco-systems.</p> <p>Historie-environmental valorization <b>can</b> increase employment in the tourism sector.</p> <p><b>Definition</b> of ecological and sustainable systems for resource exploitation.</p>

Environmental Sphere		
<i>Orientations/Strategies</i>	<i>Pre-eminent Objectives</i>	<i>Benefits</i>
<p><b>Protect</b> natural and anthropized ecosystems, which are important for biological reasons and for <b>scientific</b> research.</p> <p>Avoid a large gap between protected <b>areas</b> other <b>areas</b> open to uncontrolled transformation and exploitation.</p> <p><b>Propose</b> renewable energy sources to counteract the polluting <b>ones</b>.</p> <p>Predispose defense of territory from natural disaster.</p> <p><b>Protect</b> particular habitats, threatened animal and vegetable species, and important resources for medicine.</p> <p>Give back <b>significance</b> and vitality to old urban <b>spaces</b> through physical restoration of <b>historic</b> artifacts and their <b>socio-economic</b> promotion.</p>	<p>Assure sustainable use of natural resources, especially for strongly altered <b>areas</b>.</p> <p>Limit city growth and land consumption; re-establish physical borders in relation to contemporary urban settlements.</p> <p><b>Oppose</b> a <b>strictly</b> metropolitan system by returning <b>functions</b> and values to <b>historic</b> relationships between cities inside regional <b>areas</b></p>	<p>Greater equilibrium between <b>human</b> activity and <b>bio-</b>ecological sphere.</p> <p>Increase of <b>human space</b> quality.</p> <p>Evolution of land use modalities.</p>

The proposed classification is **indicative** because of the **difficulty** of placing criteria and orientations in only one sphere. In effect, the most recent strategy for the sustainable development of depressed **areas** is the pursuit of integration to **achieve effective** and **efficient** intersectoral equilibrium. The **specific** aim of the classification framework is to urge greater **systematic** reflection on methodology in the planning process for these kinds of **areas**.

Actually, greater attention is given to **cultural aspects**, as a **distinctive** element of **places** and **human** communities; these aspects are coming to the forefront of socio-economic development strategies. Habitats and cultures that are particularly sensitive to **human** impact are the **basic** conditions for **all** methodological and operative approaches to **protect** environmental diversity. Nevertheless, the convictions originating from strong local **specific** conditions **and/or** the necessity to resume traditional ways of using local resources are the answers to environmental sustainability problems.

From a **cultural** point of view, two aspects assume an important role in the process of **integrated/ecological** planning for urban **areas**:

- preservation of **considerable historic** environments for the intrinsic **values**, and **economic** potential;
- knowledge and recovery of 'environmental **wisdom**' of **each human** community, with reference to ancient **technologies**, formal expression, land and natural resources use.

The improvement of local population capacity to act autonomously, and the **limits** to the increase in the service sector in urban **areas**, refer to the **social sphere**, which includes the determination of public **policies** for environmental education do underline the values of **human** and cultural diversity in **each** community. **However**, the **first** goal of ecological planning strategies is **social participation** in local and national policy design. In **many** cases pursuing this **objective** is the key element to formulating methodologies and **tools** for **eco-planning**.

Three different typologies dealing with the fundamental problems of local identity and sustainable development involve the **environmental sphere**:

- conservation of **historic** and natural values of environment, by paying close attention to rarity ;
- reduction of obsolescence **causes** and the uncontrolled exploitation of resources, by improving territory protection systems;
- search for equilibrium between man and **nature** by considering: (1) perennial countering preservation with transformation actions (2) willingness to **reduce** the **difference** between greater **areas** to **protect**, and other territorial parts to abandon or leave to absolute exploitation.

Another important aspect is connected to the limit of urban expansion, and the valorization of historical networks of **human** settlements **upon** certain territories, in order to restrain population concentration.

Orientations and strategies concerning the **economic sphere** are directed both to increase local technical capacity – by using local resources • and to motivate environmental quality improvement and obsolescence reduction. The most important **objective** is the policy intention to **address** positive **economic** impacts to local communities.

The benefits derived from these sustainable development strategies refer to four major typological classes?

- ❑ *benefits from sustainable use of resources*: they concern recreational and **scientific** utilization;
- ❑ *existence benefits*: they refer to intrinsic, intangible, or unrepeatable values of goods;
- ❑ *social benefits*: they refer to the improvement of the quality of life and social behavior, and **also** to the increase of the cultural and educational level and the reduction of crime;
- ❑ *environmental benefits*: they concern **all** implications for the bio-ecological sphere, anthropic **space** quality, and land use modalities.

These kinds of **effects** and benefits **can result** from **policies** for **historic** environment preservation as **well** as local identity valorization, and the **efficient** processes of integrated development.

## 2.2. *Historic environment field. Characters and current problems*

In a complete analysis of regional resources, it is important to include the **existence**, significance, social and **economic** functions of the cultural and environmental **heritage**<sup>7</sup>, which **also** helps to determine local identity.

This concept reflects a **specific** notion of cultural goods, with an anthropological interpretation, *"substantially inclined to consider culture the **significance** that the reality assumes in **every** individual because of the interaction with the environment in which he lives; a sort of subjective tendency to **react** to **reality**, that it **constitutes** into the members of **every** human group during its becoming"*.

*Cultural heritage* is then understood in the dual aspect of community behavior and as a **result** of the **products** of its activity. The cultural testimonies are the **whole** of physical and man-made **structures**, in that they **contribute** to the **definition** of a region's identity. Cultural heritage is not the sum of separate elements, but **rather** an organic context of spatial and a-spatial realities, which **define** the **nature** of a geographical area, the understanding of its physical **structure** (natural landscape and **human** landscape) and its **historic uniqueness**<sup>9</sup>.

For **many** references, the meaning of the historical environment includes a diverse heritage, which encompasses tools and works of art or crafts, buildings and cities, agricultural **areas** and landscapes, uses, **customs**, traditions, language, **music**, poetry, and the productions of the formal and popular culture of a geographical area. The relation between conservation policy for the historical environment and the regional **economic** planning discipline is that the **latter**, in its analysis and management of regions, does not leave **out** of consideration the *region's cultural identity*. From **such** considerations arises the possibility of more exact **historic** and **scientific** planning".

Research on cultural goods has revealed the **importance** of knowing the relationships within a region, **such** as the connections between physical **structures** and the social, **economic** and cultural organization, and exploitation of regional resources. A good preservation plan cannot disregard these **factors**; it has to concern itself with proper planning processes, which **encourage** essential elements for social and **economic** development.

In effect, **every** initiative for the conservation-restoration of cultural and environmental heritage is unlike **material** for a museum, but is **rather** similar to 'live' **material** in that it cannot disregard the pursuit of a more general territorial policy, **such** as a regional policy stating goals and functions of **historic** environment preservation within contemporary society, and to plan and manage protection which is, for **all** practical purposes, essentially public.

If a conservation policy of local identity - and the historical environment that characterized it - **pursues** its safekeeping and bequest to the future, then a regional (or urban) **economic** policy **can** include this bequest in a conception of regional development consistent with history. The image of the past **can** therefore become aligned with the range of thoughtful choices for the future. The problem of our **time** is one of reconciling ourselves with our past: to **draw** from the past the meaning of a positive stimulus for new **action**. The difficulty here is ultimately the integration of a cultural goods policy with a territorial and **economic** policy".

Moreover, if we consider cultural and environmental goods as potential resources which, like others, **contribute** to **economic** planning and regional development **processes**, then it is not possible to entirely segregate their tools from those commonly appointed to the **whole** regional planning.

The unification of regional planning tools still is an unresolved subject, especially in **regard** to the methods and purposes of protecting, restoring, and valorizing the **historic** environment. Regional and urban planning **processes** need to be **modified** by introducing **changes** into the content of plans, and by promulgating regulations, both on a national and regional **level**, which are better attuned to the **specific** characteristics of local **situations**<sup>12</sup>.

In the past several years, **all** methods of assessing the value of regional territory: its identity, its natural and **human** environment, its **historic-cultural** structures, and understanding their relationships, have **changed** profoundly.

Nowadays a more complex and comprehensive system is replacing the old one. The old methodology was based on comparing sub-regions with a strong propulsive capacity and socio-economic and political power, with other, economically, socially and culturally weak sub-regions. The new system attempts to integrate **all** segments of the region, which have the potential to transform and grow.

*"The sensation that it derives from, is about a **territory** kept in a continuous **process** of transformation, reorganization, reuse in its **every** part, urban and not, **historic** or more **recent**"<sup>13</sup>. In other words, the old hierarchical system identified **many** regional situations both from a socio-economic and a spatial point of view. This was the key to their understanding and **know-how** about directing planning activities. Currently **every** area of a region tries to put forth its unique role in the development **process** and an **efficient** policy of regional and **economic** planning has to **incorporate** this new **condition** by using new tools to guarantee equilibrium and integration.*

This change of approach towards regional and **economic** **processes** also requires **changes** in the parameters and the problems of preservation. On the one hand, since conservation is no **longer** limited to **specific** parts of a region, it has to **draw** from the broad spectrum of transformation **processes** of **all** aspects of the environment; these are not easily definable through the typical **categories** of analysis. On the other hand, the actual concept of

conservation has **changed** on the basis of the new and differing concept of cultural goods, in terms not only of **historic-artistic** value, but **also** as **products** of history, and carriers of information. *"Then the **problem** is no **longer** to preserve and **restore** the **elements** where the 'artistic' value resides, but to **identify-know-understand** and **conserve** all of the information that the document, not only a producer of culture but **also** a **place** where different **human** activities have been made and **will be performed, incorporates** in its physical **materiality**"*<sup>14</sup>.

The stratification of various environmental types (social, **economic**, building, cultural, etc.) assumes great **importance** in the conservation problems of the environment (buildings and otherwise), and it **also contributes** to the determination of the physical regional order. This concept of **historic** environment that includes the meaning of **time**, history and origin, allows the acquisition of new levels of interaction potential with the transformation, breaking the notable comparison between **areas** with different **roles** in the general territorial **context**<sup>15</sup>. This points **out** the need for new tools and regulations that serve an 'integrated planning', and the conviction that local identity and **historic** heritage can play a fundamental role in leading to a more diffuse **economic** and social development.

In connection, this paper offers systematically some reflections on the **main** problems, **needs** and potential • the **aspects** that actually characterize the **historic** environmental field and are the key to the **definition** and direction of **all** actions.

It is important to **confirm** that our goal here is to point out the **fundamental** role of cultural goods and their preservation, to concretely direct sustainable development **processes**, but **also** to **contribute** to the design of tools and methodologies able to understand intrinsic characters and socio-economic values of **historic** heritage (for the purpose of its activation).

Fundamental problems of the sector • with particular reference to the culturally built heritage • refer to the attributes of **historic** goods and to social perceptions:

- the great variety of cultural goods, in terms of typology, age, feasibility, aesthetic characteristics and consequently the **difficulty** in defining modes of intervention to **achieve** equilibrium, as **well** as in identifying the cultural and socio-economic perspectives that integrated actions **can** offer to the territory;
- the obsolescence situation of artifacts, in connection with various **aspects**<sup>16</sup>, **such** as the **effective** use of goods or modes of use (which are variable over **time**). It is practical to emphasize the obsolescence resulting from overuse, which especially is related to the problems of tourism due to **historic** heritage. Furthermore, there is functional and positional obsolescence, which stems from a decrease in **demand** or the complete abandonment of a given product for different logistic conditions;
- the **lack** of interdisciplinary knowledge of **historic** heritage and local identity, which need **structured** research to reveal the potential of cultural goods for sustainable **socio-economic** development;
- the low level of popular sensitivity to the values of **historic** environment and its character as an important **economic** resource for regions and **human** communities. This factor is linked with education in environmental protection problems • which is still neglected by public institutions • and with poor communication among experts in the field, institutions, and others, and the consequential diffidence and rejection of **historic things**<sup>17</sup>;

- the **lack** of **financial** resources for research, and especially for conservation and valorization, which causes problems in **making** priority decisions;
- the strong **speculative** power of business interest that **often** sees the **historic** heritage as an obstacle for territorial resource exploitation, especially in **regard** to modes of land-use.

Despite increased awareness about the conflict between **historic** preservation and growth, the sector requires particular operative instruments and conceptual reflections. These necessities are **defined** as follows:

- ❑ greater **effective** integration between historic-cultural heritage and territory, so that goods are not considered **merely** worthy of respect but instead become more determinant resources for regional development. In this sense, it is important to **pay** greater attention to the range of elements comprising local identity, **rather** than to single monuments;
- ❑ a strong connection between physical restoration of ancient artifacts and obsolescence causes to better understand the role of heritage in the **process** of regional and urban planning, and to **address** preservation actions;
- ❑ the capacity to emphasize the perspectives of conservation as a **means** of tourism by indicating the **effects** and possible impacts of the recovery of local identity within regional areas and **human** communities;
- ❑ the design of tools of **knowledge/analysis**, valuation, **conservation/planning** for local identity and **historic** environment, or the provision of integrated methodologies to respond (at various detail levels) to the **demand** of heritage for development.

The valorization and recovery of local identity by **means** of **historic** environment conservation could **contribute** to:

- ◆ understanding the value and consistency of available local resources (**human**, environmental, etc.) in order to clearly direct sustainable development;
- ◆ **solving social** tensions by attempting to integrate, **protect** and valorize cultural diversity;
- ◆ increasing the physical quality of **places** by giving greater **importance** to beauty for psychological well-being;
- ◆ preserving local resources, e.g. through the application of traditional **technologies** and improving the quality **level** of natural environment.

### *2.3. Economics of the historic environment*

The need for 'operative tools' is apparent from the gap between theoretical convictions and concrete realization of interventions (still evident in spite of disciplinary and interdisciplinary progress). **Affirming** the status of conservation within the sustainable development **process**, the design of 'new tools' helps to **address** urgent necessities as **well** as interdisciplinary integration by:

1. 'giving people a voice'; by promoting **social** participation in the planning **process**; conducting **efficient diffusion** of information and working on modes for concrete use of people's opinions;
2. understanding the values of local identity by valorizing the resources of **historic** environment to the **real** sustainable evolution of territory and cities;

3. designing, analysing, and valuing different alternatives for 'integrated planning' actions to **find** solutions that **reach** a balance between conservation and transformation in the **processes** of sustainable development;
4. receiving and integrating points of view and opinions of various social groups and actors, which are involved in the effects and impacts of interventions;
5. adequately using the opinions of experts in relevant disciplinary **fields**.

These **economic** tools have to **define** the strategies for local identity conservation and restoration as actions of socio-economic development by **also** involving sectors of services, communications, **commerce** and so on. In effect, the ancient heritage not only has inherent and **historic-cultural** values, but **also** values in other participating **fields**. In plans involving restoration and preservation, it is important to consider and estimate everything that **may** determine effects and **benefits**, including **all** cultural, environmental, social, and **economic** **factors**. In accordance with this, one **needs** to consider **economic aspects** in terms of costs and **benefits**<sup>18</sup>. Historic heritage has aesthetic and cultural value as **well** as **economic** value, in terms of uniqueness, scarcity and irreproducibility. If this heritage is **preserved**, **benefits** can flow, thus encouraging the growth of positive externalities. If, on the contrary, intervention **policies** involve transformation, cultural goods **can** lose **many** of the **tùndamental** characteristics, which have determined their value, so that intervention then becomes a producer of negative externalities. The above discussion refers to the criterion of the ***Social complex value***, which reflects the comprehensive value of resources by extending to multiplicity and diversity.

Today the role of **economic** valuation is clearly **defined**: it is more than determining the value of outcomes; it has become a tool of 'social and cultural planning', with the capacity to define effects and impacts of various types. Then, this tool not only supports choosing among alternative actions (which is necessary because of limited availability of **financial** and **human** resources), but **also** lends support to the **fields** of conservation and restoration, in the choice of intervention directions and methods.

The **economic** approach to **decide** the value of **historic-cultural** goods and effects that **can** flow from local identity valorization activities, involves a series of objections, particularly disbelief among experts in the **historic** and planning sectors, that is possible to **quantify** intangible, cultural, and **artistic** factors.

It is equally **difficult** to objectively estimate the value of the **historic** environment either in monetary terms or in other units of measurement. We **can** admit that it is an 'economic good' of a particular kind, because it has the characteristics of usefulness, it has use-ability and has limited availability, and it **provides** human survival as its primary utility. There is a relation between **historic** goods and man, the **importance** of which has to be expressed by an informed and interested community, **who** **desire** cultural **continuity** by **means** of tradition. It **may** therefore be easier to evaluate the implications of **historic** environment conservation in terms of the value of opportunities that have to be renounced in order to preserve the environment itself (for example, in terms of the value to be derived from the best alternative use of the **site** **where** the **cultural** goods are located), or on the contrary, in terms of the willingness of people to **pay** in order to preserve the **historic** heritage.



There is a substantial **difference** between choosing whether conservation is achieved by simply maintaining conditions as they are, or if conservation is a **means** of rehabilitation or restoration. This **difference** is surely one of the **main** philosophical problems of the conservation discipline; the dissimilarities are **also** found in the **economic** sphere, both in intervention **costs** and **benefits** (especially), because they have different **weights**, **roles**, and **descriptions**. The appraisal methods **can** potentially become tools to ameliorate the difficulties of evaluating **economic** value and **contribute** to the decision processes. They must **also** have the capacity to analyse interventions with different characteristics and complexities, and with a variety of purposes, so as to allow for a comparison among the defined alternatives (see **also** **Figure 4**).

In conclusion, a reflection **upon** the character of **historic** preservation as a 'productive activity' reveals that the utility of this concept is connected to a more complete **definition** and determination of flowing **effects**. The recovery intervention - with particular reference to the built heritage - is able to **promote** **economic** advantages with respect to:

- conservation as a transformative **action** of **components** of the **historic** environment into new elements, which **provide** greater utility without losing their intrinsic and inherent characters. A 'plus-value' in the goods emerges, in connection with the actual necessities of public and private fruition;
- integration of **historic** goods in contemporary life and the processes of sustainable development. In this way, it is possible to observe the adaptation of the original functions into new **ones**, nearer to the **social** and **economic** request. Thus, the plus-value gains from public **effects** and **benefits** of conservation: from *plus-value* to *social value*.

### 3. '*Integrated planning*': *Methodologies and tools for territory analysis, planning, and evaluation*

#### 3.1. *General outline.*

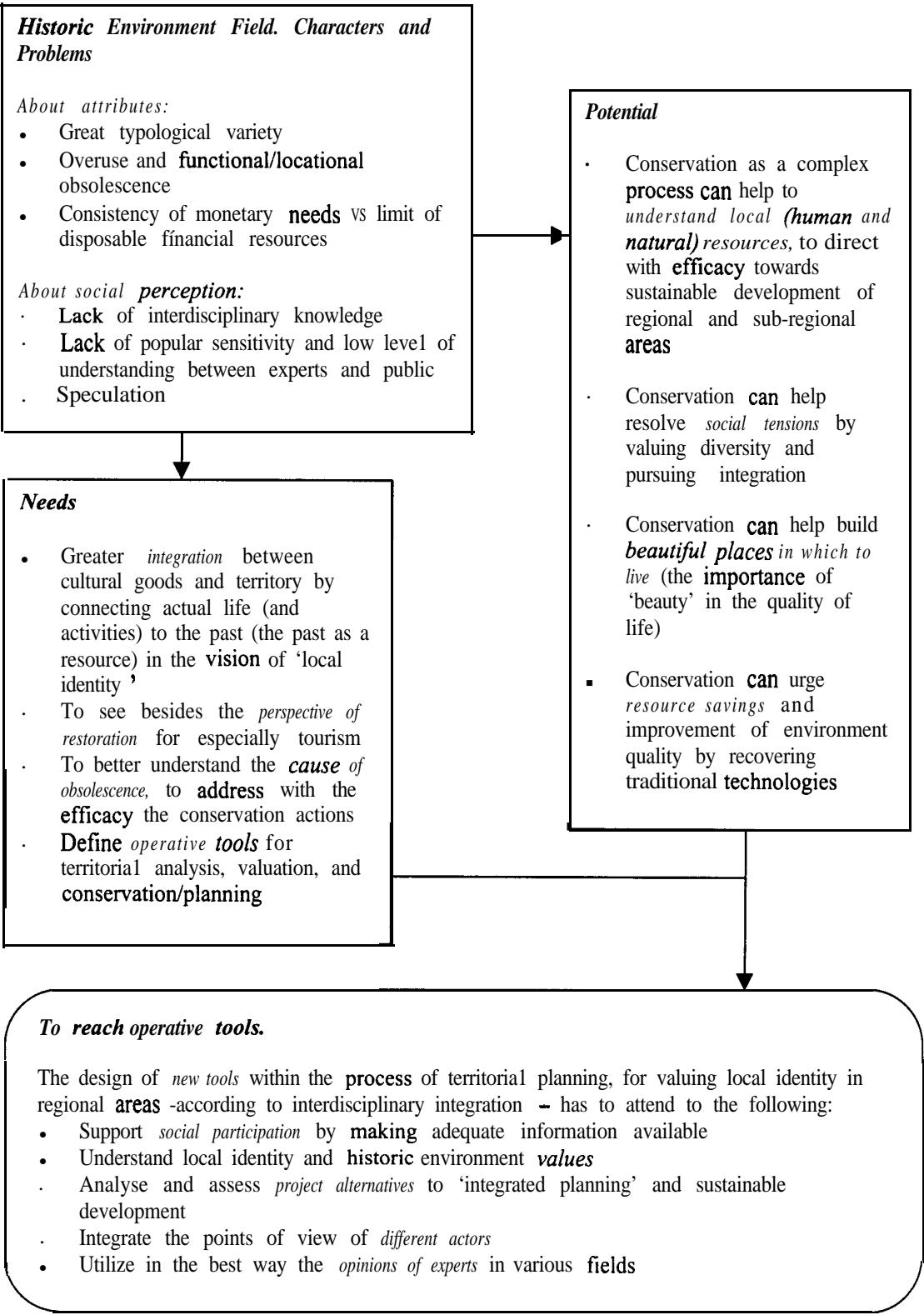
Here we elaborate on the relationships among the **fields** of **Historic** Preservation, **Regional** Planning, and **Economy**, within the theme of local identity valorization, to **indicate** that the tools to design have to make reference to these **fields**, and represent a mode for their integration.

'Integrated planning', intends to **define** an **action** modality that is able to consider the multitude of territorial **factors**, and is the **ultimate** manifestation of the various interdisciplinary **components**.

'Integrated planning' answers the **needs** of a sustainable development program by being dedicated to local identity recovery (with its *modus operandi* in considering **historic** preservation as fundamental to **social** and **economic** growth). It is substantially the search for the *maximum equilibrium* for the territory and its human communities. Equilibrium is sought **after** the following levels:

1. *spatial level*, between protecting certain **areas** for their evident great values, and leaving other **areas** to uncontrolled manipulation and degradation;
2. *temporal level*, for a correct and articulated program with short-term and long-term objectives;

Fig. 4. The role of historic environment in local identity preservation



3. *environmental level*, between resource utilization for necessities of life and the **needs** to restrain exploitation to the point of irreparable **loss**; but **also** equilibrium between a **conservative** approach to territory and urban **areas** and the transformative approach;
4. *economic level*, between the **fundamental** aspects of private and social costs and benefits, which **can** flow from conservation actions in regional **areas**; but **also**, equilibrium in the externalities between the various social groups;
5. *technological level*, between the **needs** of the continuous • and **often** irresponsible – **socio-economic** development during the actual period, and the **collective will** to review and substitute the existent **technologies** if necessary.

The **clear** integration between planner, preservationist, and **economist** expresses itself in the necessity to **find** common tools for sustainable development, and equilibrium in the **main** aspects of private and social costs and **effects**. This **makes** evident the **importance** of particular techniques of valuation, which are able to consider the varieties of costs and **effects** for conservation and new utilization of cultural goods.

### 3.2. *Role of economic valuation for regional planning and local identity conservation.*

The need for tools that **can** help direct conservation and activation interventions, to **identify** priorities, and to **define** the **effects** on the region for these types of operations, is evident.

In view of this, the **process** of valuation assumes particular **importance**; it is fundamental at different levels: from decision **making**, to planning, to implementation, to **managing**<sup>19</sup>.

**However**, it is important to specify that the **fields** of urban and regional planning and environmental economics **already** have developed appraisal methods, techniques and applications, which have become regulations in some countries. In the field of **historic-cultural heritage**, **however**, research is at an early stage, although a few isolated studies have been **carried out**. Analyses of interventions on restoration and reuse are associated with proposals of cultural goods valuation, but **much needs** to be done in researching and systematizing of results, and in establishing methodological definitions.

Finally, it **needs** to be stressed that the **main** problem in the evaluation of **historic heritage preservation projects**, which involve **effects** and benefits, has to be quantified in monetary terms. It is towards this topic, in particular, that research efforts are **directed**. This research distinguishes the various types of **values/effects** of conservation, the best existing valuation techniques for the measurement of **benefits**, and determines the **effects** that are **often** considered 'immeasurable', especially for the type of goods they are derived from.

On the basis of theoretical and practical studies and reference to the fundamental **needs** of the field, we **can** now **define** the **main** goals of using valuation systems for local identity preservation and **valorization**<sup>20</sup>.

- Valuation regards the **historic** environment as an 'unrenewable' resource. It measures the level at which this resource **can** be used.
- Valuation **can** then attain a 'decisional' role related to the character and quality of the **historic** environment by choosing and **defining** the object, purposes, priorities, and solutions of alternative hypotheses.

- It enables the definition and **quantification** of costs, values, and effects of activities on the **historic** environment, with **regard** to conservation, restoration, and '**transformation**'<sup>21</sup>. In the context of an overall project analysis, valuation systems help "to **redress** the balance between **quantifiable** and non-quantifiable **effects**"<sup>22</sup>; they **can also** narrow "the field remaining for 'pure' **judgement**"<sup>23</sup> with reference to certain benefits.
- It helps **define** the role of the 'decision' about local identity conservation, within the more general **economic** system (valuation systems **can** offer directions of **economic** performance).
- With valuation, government **policies can create** greater power to direct **historic** heritage use by more efficacy. This **provides** the **means** of **fixing** the quantification of taxes, charges, and subsidies for interventions in the **historic** environment.
- Finally, it enhances the role of 'conservation' in the **process** of regional planning.

There are **critics** of appraisal **projects** with the more developed field of public goods and environmental valuation. By transposing this criticism to the field of local identity and **historic** heritage preservation, it is possible to **identify** a few objections in **regard** to the use of valuation techniques for costs and benefits in cultural goods preservation. They are:

- In countries **where** historie-cultural heritage is important and has a significant presence, there is always strong resistance (especially from experts in the specific **historic** and preservative disciplines) against using **economic** tools to make decisions about interventions to **protect** and perpetuate **cultural** goods. The task is - **very** important in **specific** regional situations - to integrate **economic** valuation in choices for **historic** environment preservation with **inputs** from scientific disciplines.
- The experience in **many** western countries reveals that **economic** appraisal is **often** used incorrectly to **justify** public **projects**. Manipulation of the valuation methods is always possible, but this does not **reduce** the utility and technical value of tools, **such** as 'decision' criteria if their use is correct and **honest**.
- In the field of the historie-cultural heritage, and in the natural environment one, there are several essentially **unquantifiable aspects**; any **attempt** to **attach** a monetary value on these **aspects** is evidently strange to **many**. However, one **can** argue that most of these **factors** are only apparently non-quantifiable, as various valuation efforts have demonstrated. Contemporary literature in this field shows that the valuation techniques have incorporated interesting methodologies for the study and analysis of intangible effects in **historic heritage preservation**<sup>24</sup>.
- In the sector of local identity conservation, valuation is in its early stages. The techniques have their origin in applications for public goods or environmental economics. Although there are remarkable analogies between these sectors and the **historic-cultural** sector, the transfer of valuation methods surely cannot be **automatic**. Methodological and technical efforts to attain this transfer are required.
- The current techniques were **defined** in developed countries; one objection to this lies in the difficulty of adapting these methods to less developed societies, including developing countries and backward territorial **areas** within developed countries.

- In order for valuation to **render** satisfactory results, technical and **economic** data are required. This is **very** difficult to obtain in developing as **well** as developed countries, especially for certain sectors. This largely is due to the complexity and variety of their components and the **lack** of knowledge. This is especially true in the **historic** environment sector.

3.3. *Objectives, indicators, strategies.* A *proposal for an operative methodological framework* For the purpose of this paper, we **propose** a methodological framework taken from the **historic** environment and applied to ecological development **processes**. The general **structure** – which shows relations and connections – is illustrated in Figure 5.

First, there is the **definition** of local identity and the **historic** environment components, **where** there are several **classifications** in the disciplinary field, which substantially refer to two **factors**:

- the **nature** of cultural goods: tangible and intangible
- the typology (archaeology, architecture, demo-ethno-anthropology, **etc.**)<sup>25</sup>;

Our methodological **proposal** is a functional approach to the design of actions for local identity valorization, and is based on three fundamental **categories**: artifacts, socio-cultural components, and the natural and anthropologic environment. The values of **historic** heritage are considered on the basis of present situations (emerging actual use value). **Effects** and impacts flowing from conservation are indicated for actions on single goods (emerging **existence** values) and within the territorial context (global actions, regional plans, total **economic** values to be considered).

Certain **factors** lead us to a more unified theory of integrated conservation: **social perception** of the **main** problems of the historic-cultural heritage; the role of goods in different parts of the **territory**<sup>26</sup>; the goals of **preservation** actions, in conjunction with the necessity to pursue the 'equilibrium' in the development **process**.

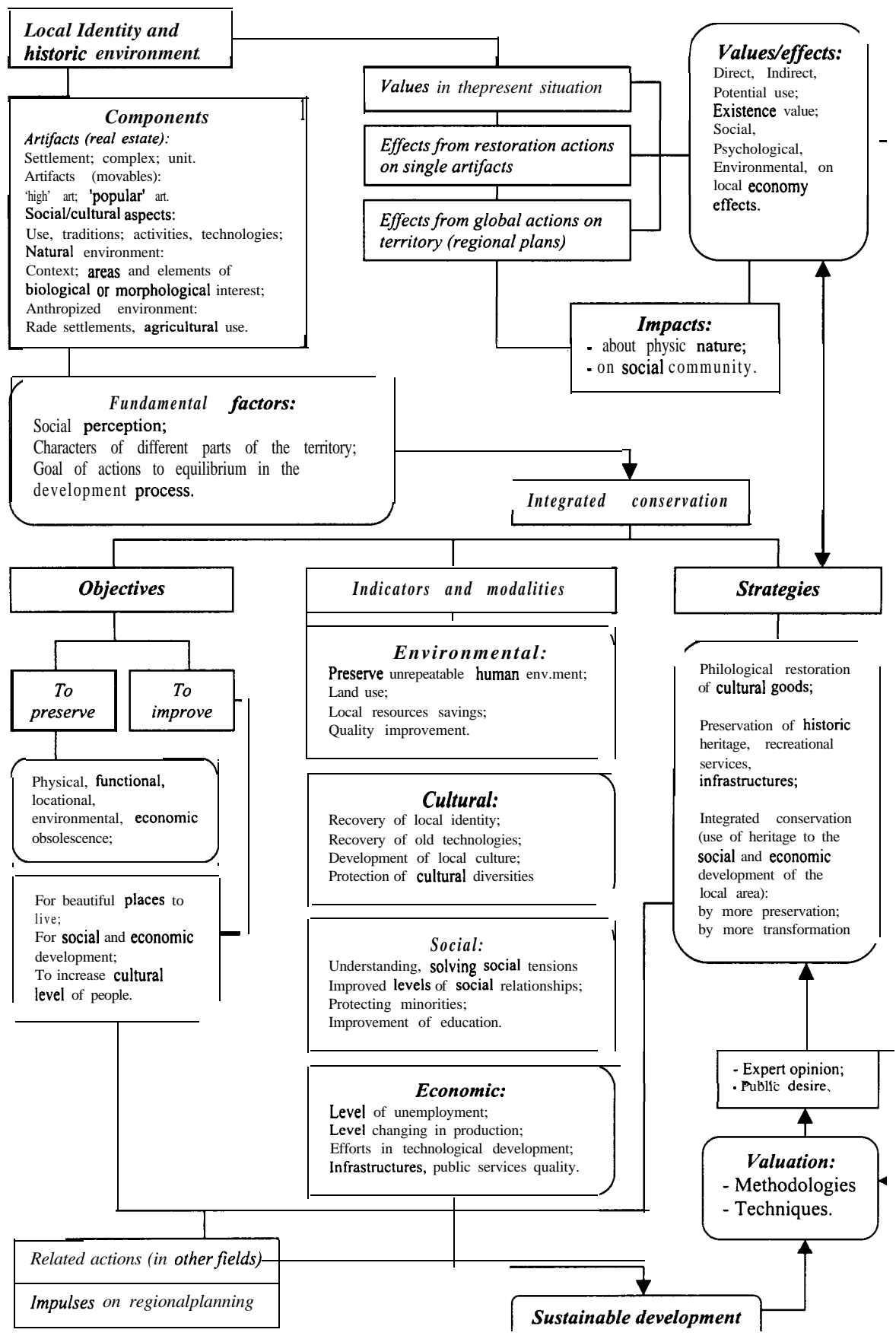
As a **fundamental** step towards sustainable development, conservation must have **precise** goals, indicators, modes, and strategies. The *goals* reflect the willingness to preserve and improve: to **preserve** from the **main causes** of obsolescence (which is not only physical); to improve towards greater environmental quality, cultural evolution, and overall **economic** growth. The *indicators* and *modalities* refer to the environmental, cultural, **social**, and economical spheres. For **each** sphere we **indicate** only the **main** elements representing the urgency for a better future, which are impossible to ignore in the planning **process**. The *strategies* consist of three **main** approaches: restoration of the **historic** heritage to hand down to future generations; preservation of cultural goods and related recreational services improvement to **enjoy** people from outside the area; integrated conservation for a global **economic** growth of regional **areas**. In this last mentioned case, the concerns are about:

- greater **preservation**, the pursuit of sustainable development through land use savings, and environment quality improvement;
- greater transformation, the pursuit of sustainable development by using local resources.

The proposed methodology **also** considers input from *other fields*, in the form of concrete integrated actions:

- Tourism services, for the recreational use of monuments;

Fig. 5. Recovery of local identity in the sustainable development process. Towards a methodological framework of analysis and evaluation



- **Nature** preservation, by considering the modalities of land use in connection with a minimization of new buildings;
  - Transport, about **aspects such** as old cities and the **needs** of moving inside;
  - **Agriculture**, to rehabilitate traditional modes of production;
  - Industry, to develop the technological research towards less environmental damages.
- The role of *vuluation* is underlined to assess strategies and actions, but **also** to **address** them by considering expert as **well** as public opinion.

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- <sup>1</sup> See **McNeely** and **Keeton**, 1995. Other recent contributions about local and cultural identity are: Lucas, 1992; Hall and du Gay, 1996; Beall, 1997; and **Wilson** and **Donnan**, 1998. See **figure 1** which tries to illustrate the steps towards the actual concept of local identity and the role of the various **historic-cultural components**, by considering their potential within the actual processes of **socio-economic** development of regional **areas**.
- <sup>2</sup> To document both the physical planning approach and the socio-economic one – with the attention to environment protection – see recent studies: **Jacobs**, 1993; **Daclon**, 1995; **Larkham**, 1996; **O’Riordan** and **Voisey**, 1997; **Fusco-Girard** and **Nijkamp**, 1997; **Cicerchia** 1998; **Nijkamp**, **Bal**, and **Medda**, 1998; and **Gerlagh**, 1999.
- <sup>3</sup> **Malusardi**, 1992.
- <sup>4</sup> **Compare** **Trevisiol**, 1995. For theories and processes of sustainable development, see **Giaoutzi** and **Nijkamp**, 1993; **Mitlin** and **Satterthwaite**, 1996; **Pugh**, 1996; and **Nas** and **Veenma**, 1998.
- <sup>5</sup> **Figure 2** is revisited from **Mignolli**, 1995.2.
- <sup>6</sup> Some references are: **Knetsch-Davis**, 1966; **Haveman-Weisbrod**, 1977; **Kneese**, 1985; **Mitchell-Carson**, 1989; **Tietenberg**, 1992; and **Lichfield**, 1993.
- <sup>7</sup> This is true for European countries and for the USA, **where** studies and activities for **historic** preservation in regional planning are continuously growing. See **Birch** and **Douglass** (1984).
- <sup>8</sup> The quotation is drawn from the Introduction of **Tentori** for the Italian edition of the book of **Kluckhohn** and **Kroeber**, 1952.
- <sup>9</sup> See **Lee**, 1992; and **Plachter** and **Rossler**, 1995.
- <sup>10</sup> This is a **very** contemporary subject, particularly in Europe, **where** studies are in progress. It is important to note the remarkable interdisciplinarity of this field, **where** various perspectives combine with interesting results; see **many** contributions in **Lee**, 1992.
- <sup>11</sup> **Many** complete references apply to the Italian situation, **where** the studies in this field have no counterpart in practical applications. **Compare** **Emiliani**, 1974; **Calvani**, 1987; and **Negri-Amoldi**, 1988.
- <sup>12</sup> It is possible to note a **time** lag in incorporating planning tools as **well** as environmental planning in the **definition** of **economic** and territorial models. See **Fusco Girard**, 1987; **Nijkamp**, 1989; **OECD**, 1997; and **O’Riordan** and **Voisey**, 1997;.
- <sup>13</sup> **Padovani**, 1987. **Many** references on this matter are in several works of various authors, in **Ministero per i Beni Culturali ed Ambientali**, 1987.
- <sup>14</sup> **Padovani**, 1987.
- <sup>15</sup> For a general outline, in consideration of different disciplinary approaches, see **Emiliani**, 1974; **Padovani**, 1987; **Lichfield**, 1988; **Nijkamp**, 1989; and **Winpenny**, 199 1.
- <sup>16</sup> See **Lichfield**, 1988.
- <sup>17</sup> This refers to two **aspects**: the modality of the scientific world, which is **intent** on knowledge production to use exclusively in its own sphere (therefore **having** few possibilities to impact on territory and **social** communities); and the **action** modalities of institutions (in some countries of the western world), which **pay** more attention to repressing **action** than to prevent damage and risk to the **historic** environment.
- <sup>18</sup> It is important to **mention** here the double **nature** of **costs** and benefits, the **social** and the private; from the comparison between these two typologies, there flow **many** problems and obstacles for the conservation **process**, so the search for equilibrium is one of the **main** goals in the determination of intervention ways.
- <sup>19</sup> See: **Lichfield**, 1993; **Zeleny**, 1993; and **Pearce**, **Whittington**, and **Georgin**, 1994.
- <sup>20</sup> A useful reference (given the necessary adaptations to our specific field) about why valuation and the **importance** of appraisal for the environment matters, are **Kneese**, 1985; **Winpenny**, 1991; **Bingham et al.**, 1995; and **Bockstael et al.**, 1995.
- <sup>21</sup> One could **also discuss** problems and characteristics of **historic-cultural** heritage actions, but this exceeds the scope of this paper. **However**, it is important to say that if the **historic** environment contains the stratification’s of **all** events (of which **each** has ‘transfotmed’ the previous situation) overtime, it is right that the current age **also** leaves its distinguishing mark (in this sense the “transformation”), provided that it **respects** for existing realities and values of the environment.
- <sup>22</sup> **Winpenny**, 199 1.
- <sup>23</sup> **Winpenny**, 199 1.
- <sup>24</sup> See **Howe**, 1993; and **Kling**, 1993; for **real** experiences in the historie-environmental field, see **Grittani**, 1993; and **Fusco-Girard** and **Nijkamp**, 1997.
- <sup>25</sup> See the classification in **Mignolli**, 1995.1, and the relative references.
- <sup>26</sup> The approach of **historic** preservation is different if cultural goods are in central **areas** or in peripheral **areas**. In periphery they **can** assume a key role for improvement processes of life quality, for depressed **places** in the western world.